

SUPPLY ANALYSIS PROJECT REPORT

**Coalition to Advance Learning in Archives,
Libraries and Museums**

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COALITION TO
ADVANCE LEARNING
IN ARCHIVES, LIBRARIES AND MUSEUMS

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- Factors in member selection of CE/PD
- Does CE/PD drive organizational membership?
- Evaluation methods
- Cross-cultural-sector training opportunities
- Availability of documentation/list of all CE/PD offerings
- Additional comments on CE/PD

A master version of the Moderator’s Discussion Guide is included here as Appendix A. It includes all questions and probe questions, and could be utilized in the future as the basis of further research activities. Each interviewee received a Discussion Guide with questions and background information approximately one week prior to their call. While Clareson and LYRASIS staff member Alicia Johnson took careful notes on each call, this report does not focus on individual answers, but rather reports on trends in the aggregate.

Continuing Education/Professional Development Supplier Trends

Role of Continuing Education/Professional Development

All six of the organizations interviewed said that while continuing education/professional development was not the sole reason for being of their organization, it was “a standard service,” a “historically core function,” “one of the most visible things we do,” and “a primary way we reach out to our members.”

Continuing education/professional development services are often within a department or division of an organization; within two of the six organizations interviewed, it is a standalone department of 1-2 people. Even in those organizations with a dedicated department, though, staff recognized that offering continuing education/professional development was “the responsibility of many people across the organization.”

Continuing education and professional development are “the public face” of the organizations, a way that they can gain membership, and one of the ways members “see the value of what we offer.”

One interviewee noted that the continuing education/professional development offered by regional and national cultural heritage organizations may be “the only training that many professionals in our field can get” because fewer numbers can attend national conferences and conventions.

One organization has recently undergone strategic planning, and renewed their efforts in continuing education/professional development. At this organization, continuing education and professional development is “a core activity across all of our services and to all of our member constituencies.”

So, while not the single/only function of the interviewed organizations, continuing education/professional development is “ingrained into everything we do,” as one organization’s representative stated.

Identifying Needs and Trends

To identify continuing education and professional development needs among their members and communities, the six interviewed organizations used a variety of methods.

- Advisory or steering committees that meet 1-2 times a year
- Annual or biennial needs assessment surveys
- Communities of interest may coalesce around issues and identify topics of need on an ad hoc basis.
- Association and organization staff are “plugged in” because of close relationships with members and constituents, and can often identify educators.
- The organization’s board of directors may identify opportunities at meetings or retreats.
- Individual members and specialty groups can bring forward ideas. In one organization, it is the feeling that these groups are good at bringing new techniques, which need to be taught, to light.
- One organization has a formalized process through an Education and Training Committee to look at the selection of courses.
- Another organization mentioned that they “listen to what members ask for on their evaluations.”
- One of the associations interviewed may identify a theme for a “hot topic webinar” first and then develop a full-day onsite course later.

A sub-question in this part of the discussion asked if the interviewed organizations intentionally gear the marketing and development of CE/PD offerings to early-, mid- and late-career members. One organization does not use this approach at all; one concentrates on education for senior or late-career members; and another feels “mid-career members” are the “sweet spot” because they want to have mastery of a variety of topics. Yet another avoids early-career classes so as not to duplicate graduate program training.

Another organization develops “basics” classes for early-career members, “general” sessions for mid-career, and more technical sessions for advanced or late-career members.

One of the most holistic answers to this question is that “engagement with our organization is a career-long trajectory—from student/attendee to mid-career committee member/speaker; then mentor/board member/speaker.”

Through evaluation, committee, board, and individual input, identification of needed courses is becoming more data-driven (both qualitative and quantitative) at most of these organizations.

In a comment that summarizes discussion on the “identification” section, one organization’s representatives said, “When committees or groups identify important continuing education/professional development topics and programs, we are successful because these members all have a stake and all agree on the need for training on a specific topic.”

Surpluses and Shortages in the Field

Interviewees were asked if they saw topics where there was too much or too little training offered across the cultural heritage sector (beyond just their own organizations). Some of the information uncovered in these discussions can have a direct impact on the future work of the Coalition.

The representatives of one organization identified that there were “sexy and non-sexy topics.” Professional development providers may know there is a need, but often members of organizations won’t attend sessions on topics such as Risk Management, Insurance and Liability, Disaster Planning, and Financial Management, because they may feel they and their organizations cannot fully implement what has been learned. However, a session focused on 3-D Printing will attract a capacity crowd.

The same organization saw a surplus of courses on grant writing and fundraising, but feels there is an opportunity for partnerships and cross-sector training.

Another organization, however, saw a strong need for and interest in Emergency Planning and Preparedness courses and feels we “still have not made a dent in the need.”

Representatives of another organization felt that there are shortages in the “soft skills” areas such as management, human resources, cultural competencies, copyright, and people skills—all areas identified by continuing education/professional development consumers as needs in the 2015-16 focus group sessions and survey.

Another organization saw “duplication but not surpluses” on topics such as scholarly communication, scholarly publishing, and value/ROI. This organization saw a need for content on topics such as:

- Digital Presentation
- Digital Curation
- Diversity/Inclusion/Social Justice
- Marketing/Outreach/Advocacy
- Leadership Development
- Instructional Design

This was echoed by a respondent who saw a need for leadership training, which is currently “very effective but very expensive.”

Another organization saw similar needs, including:

- Board Cultivation for Minority-Focused Institutions
- Succession Planning

Curriculum Development

The organizations interviewed have a variety of methods by which curriculum is developed.

- Outside consultants (two organizations)
- Experts in the organizations (staff/in-house)
- Academic experts
- Instructors working with staff and communities
- Volunteers may either develop courses or maintain those created by outside experts
- Members of one organization may either have a class idea and execute it or propose it to a peer expert to develop

Utilizing a combination of these methods can help individual organizations and the Coalition as a whole develop needed offerings.

Promotion

Two organizations had marketing staff (full or part-time) who, among many items they were promoting, worked on promotion of workshops and educational offerings.

Tools used by the organizations to promote their continuing education/professional development activities included electronic newsletters, printed newsletters and journals, listservs, email blogs, and website postings. Other organizations added Facebook posts, news releases, and personal emails to the promotional mix. Many also said word-of-mouth is important. Direct mail is no longer used by any of the organizations interviewed.

Most of the organizations promoted offerings to both members and non-members except one that specifically does not open any of its courses to the general public as they are focused on a very specific audience.

One organization that “did not see a dip in workshop enrollment during the Recession” credits their association-based certificate program for keeping audience numbers steady.

Distribution

While national cultural heritage organizations offer a combination of webinars and in-person classes, local groups in a city or region allow for more in-person sessions and interest group readings. Recorded webinars (offered once, then available on-demand)

are also growing. Additionally, two groups offer multi-session online “courses” providing more opportunity to deliver content than a brief standalone webinar.

Class Development Funding and Pricing

Organizations use grants, federal funding allocations, general operating funding derived from membership dues, in-kind effort from member volunteers, and conference registration fees to fund class development. Very few pay members for class development activities, and when they do, it is through an honorarium.

While a few of the organizations offer free classes, most have pricing levels for their offerings, and generate revenue through their educational offerings. Some webinars on new or hot topics may be offered for free. Many organizations have had set prices for full-day classes which have stayed stable or risen only slightly, over a number of years.

Most of the organizations see their continuing education/professional development offerings as breakeven efforts. One group said their philosophy is “how inexpensive can this be so we can still breakeven?” Some charge higher prices for non-member participation. One specifically mentioned that their Professional Development Committee and Executive Board sets pricing.

Participation Payment

Most of the organizations interviewed said that their members’ institutions are paying for employee professional development. Those organizations that see members paying for classes out of pocket often try to run a large number of free sessions. One organization tracked attendance closely enough to know that conference attendees had their registrations paid through their organization, but for workshops, 60% of attendees were paying personally. They also noted that volunteers almost always pay for their own continuing education/professional development, and that some attendees pay themselves and have to take vacation days. All of these variables have led one of the organizations to try to make as much training as possible free, with a nominal fee for some classes.

Education Program Sustainability

Most of the organizations interviewed said sustainability was the most difficult question of the interview. A number of the organizations said they had “few internal/organizational conversations in a systematic way” about this topic. However, because almost all of the supplying organizations said that continuing education/professional development is one of their most important activities, they are beginning to consider it in strategic planning.

Sustainability practices among some of the organizations included:

- The previously-mentioned certificate program where individuals and their organizations have shown a strong interest in continually utilizing the organization’s continuing education/professional development offerings.
- An endowment from a private funder which is dedicated to support the continuing education/professional development Program
- One organization has a development staff person investigating a variety of sponsorship options for courses

Overall, this is a topic which many of the interviewed organizations are highly interested in; focusing conversations on continuing education/professional development program sustainability would be an excellent role for the Coalition.

Selection Criteria and Barriers

A question on criteria used for selection/choice of workshops taken was central in both the Mapping the Landscapes Survey and Focus Groups.

When posed to the continuing education/professional development suppliers, there was some similarity to answers from consumers, but some notable differences as well.

- Cost, of course, is a large factor. Prices must be competitive and affordable; it’s an investment for our registrants.
- Very few organizations “bundle” the cost of travel, lodging, and regulation into one overall course cost; the one organization that has tried this repeatedly only feels it works about 50% of the time they try it.
- “Research drives our content. We align with the needs of our community,” said one organizational representative.
- The educational offering needs to address a felt/seen need of members/constituents to be successful.
- “Immediate-payback courses” fill up more quickly than concept/philosophical/ethics-related courses.”
- “Our audience wants to be taught by colleagues. When we bring in ‘outsiders’ to teach, it is difficult to attract registrants.” So, the instructor being a knowledgeable member of the association is very important to the success of this organization’s classes.
- Location can play a big role—if the class is in a new location, that can drive up registration numbers. Also, if the host organization is a well-known museum or institution, that will generate more interest.
- Convenience of the course—not just how far away it is but the ease of travel to get to the class location and the number of days of the offering is important as well.
- One organization is definitely seeing less in-person participation with the availability of instruction via other modes.
- Two organizations said class topics are the most important factor.

Does Continuing Education/Professional Development Drive Membership?

When asked if continuing education/professional development drive membership to their organizations, the interviewed organizations said continuing education/professional development is “a member benefit,” a “key component of our offerings,” “tied in with networking; it is a huge part of what we offer,” and “it is a way for our organizations to remain relevant.”

Even in organizations where participants are invited to join, continuing education/professional development is an attractive offering because organizations “see opportunities for doing professional development among peers.”

So, while continuing education/professional development may not be the only driver of membership to these organizations, it is certainly a central driving force that “incentivizes members.”

And, by providing discounted continuing education/professional development registration rates to members, a member advantage is offered.

Evaluation

This was another area of the discussion in which all of the interviewed organizations felt they needed further planning and development. Comments included:

- “We do evaluation, but not well. It is perfunctory.”
- “Evaluation adds another layer of work, and some of our local/regional organizations are volunteer-run, so it is an additional challenge for them.”
- “Evaluation works best when there is systematic data collection and detailed metrics. Professional development surveys done every few years can provide longitudinal comparisons. Organizations that can do evaluations 9-12 months after the course and ask if organizations have shared or applied results, or if the class has improved the participant’s abilities, are very helpful.”

A comment from one organization was reflected by many of the others interviewed: “We need to develop a better way of understanding the information we are getting.”

Evaluation of continuing education/professional development was a difficult subject for all of the organizations to discuss; making the development of some best practices in evaluation central to Coalition work could be beneficial to all members.

Cross-Sector Training

All of the organizations interviewed were Coalition members. However, all felt they were only at the beginning of offering cross-sector training.

- “We are not thinking of other cultural heritage institution types specifically, and we don’t design classes for cross-sector participation, but we don’t rule it out.”
- “We are all in the business of knowledge diffusion, so working together on shared topics makes sense.”

One organization has become “more mindful of cross-sector needs” through the Coalition’s Collective Wisdom LAM Conference Exchange Program. They are trying to incorporate library/archives/museum approaches in their course descriptions, and are reaching out to local, state, regional, and national associations in other sectors to broaden their reach. These two approaches could be modeled by other organizations.

Another organization sees that the biggest issue in cross-sector offerings would be marketing.

Partnering with other types of organizations is working well for some of the interviewed associations. An archival-based organization is working with genealogists, records managers, historians, librarians, and other allied groups for their programs.

Another organization said it is “re-envisioning itself, and looking for opportunities to work on cross-sector issues,” mentioning digital preservation and social justice/diversity/inclusion as key topics of focus.

Lists of Offerings

While a few of the interviewed organizations have a cumulative list/document of their offerings year-by-year, many have their most recent and comprehensive information on their websites, and would have to work to compile a cumulative list. The organizations are most strongly focused on providing information about current offerings.

Additional Comments

At the end of each interview, there was an opportunity for participants to provide additional comments on their continuing education/professional development supply activities.

Most said they saw benefit in working together to develop cross-sector offerings; they were happy to see work done on identifying gaps both in and across sectors.

Offerings certification and documentation of skills or credentialing was an area of interest to organizations that were not currently doing this.

The strongest statement came from one interviewee who said people in cultural heritage organizations should “constantly engage in lifelong learning.” When she heard about organizations who do not support their employees’ participation in continuing education/professional development, she said, “If you are opposed to this or don’t support it, you are in the wrong business!”

Comparison to BERK Consulting Study

In late 2015, BERK Consulting, which had worked previously with the Coalition membership to provide strategic facilitation, published a report, “Analysis of Continuing Education and Professional Development Production.”

This initial supply analysis report discussed “CE Production within a sample of member organizations to illuminate where there may be conflict between the (Coalition) goals and the business interest of its members. The analysis is exploratory, rather than exhaustive, and meant to support a common understanding of the types of organizational interest that are impacted by the (Coalition’s) efforts as a basis for further strategic development.”

This 2015 study of “the CE/PD value chain framework” included a look at the five steps of CE/PD production:

- Identifying Needs
- Technological and Human Inputs
- Development and Production
- Marketing
- Distribution

The findings in the BERK report were oriented toward the CE/PD business, and in some cases dealt with concerns, problems, and barriers in the work of CE/PD suppliers. Many of the findings in that 2015 report rang true in the 2016 interviews, but the nature of the findings and recommendations of this report are geared toward ways in which Coalition members can work together to address trends and concerns in supplying CE/PD.

Key findings of the BERK study, by step, are included below. In addition, comments are added in italics in areas where there are distinct differences in the findings of the two studies:

- Identifying Needs
 - The CE/PD agenda is mostly driven by a volunteer committee – *the 2016 study found many drivers and methods for development of institutions’ CE/PD agenda/curriculum, including advisory committees, steering committees, formal Education and Training Committees, Board member input, regular educational needs assessment surveys, and the input of communities of interest or specialty groups*
 - Staff play an important role in tracking CE/PD needs in the field and have significant discretion in identifying CE/PD needs.
 - Data-driven decision making is valued, though decisions are often made quickly and ad-hoc – *Most of the organizations interviewed for this project feel their work is highly data-driven, through member surveys, evaluations, and discussion with individual members or groups of members.*

- In some cases, CE/PD decisions are made to leverage an asset or are based on external pressures.
- In addition to the above, CE/PD choices sometimes serve an organization's strategic initiative or ambition.
- Technological and Human Inputs
 - Most content is contributed in-kind from association members.
 - In rare cases an organization may issue an RFP for content.
 - While more the exception than the rule, some organizations create CE/PD based on in-house expertise.
 - Staff provide skills in information packaging, dissemination, and technical assistance.
 - Organizations supply other production inputs.
 - Organizations hold a canon of content that can be redeployed.
- Development and Production
 - Production is often led by the volunteer topic sponsor
 - CE/PD production on a predominately volunteer basis requires a “leap of faith” – *the organizations interviewed in 2016 felt that their members who developed CE/PD activities or helped to bring external offerings to the association were very tuned into the pulse of the overall membership and their educational needs.*
 - Staff play a producer role, though the level of involvement varies.
 - CE/PD staff's role serves to ensure quality and a relevant program of CE/PD offerings.
 - Some organizations provide an overall framework and standards to assure programming quality.
 - All organizations evaluate their CE/PD programs.
 - Some organizations have added certification services or commodity strategies to their CE/PD offerings.
- Marketing
 - Organizations may or may not have dedicated marketing resources for CE/PD.
 - CE/PD staff are responsible for ensuring sufficient interest and attendance at each CE/PD offering.
 - Organizations use a variety of strategies for pricing.
 - Marketing lacks robust segmentation strategies.
 - Organizations have an effective, but perhaps under-developed brand image and equity for CE/PD – *Most of the organizations interviewed in this project felt that their CE/PD activities were among the top aspects of their member benefits as far as brand image/recognition.*
 - Most see other Coalition members as their competitors – *While a few of the organizations interviewed in this project saw one or two other Coalition members as competition, the spirit of collaboration, and quest for improvement of CE/PD across organizations and sectors was much more of a driving factor in their answers during their interviews.*

- Distribution
 - The trend towards online content is still growing, and organizations are innovating to make it more effective and meaningful.
 - There is limited transferability of content.

Where the findings of the 2015 BERK report and this study differ the most is in the discussion and recommendations from the findings. The BERK study looked at CE/PD needs and interests over a person’s career (early-, mid-, and late-career), and that was not a large topic of discussion among the 2016 interviewees. “Many interviewees spoke of CE/PD offerings as a driver of membership” in the BERK report; those interviewed this year said it was a member benefit, but certainly not the only driver of membership.

Recommendations in the BERK study included cultivating connections among members beyond CE/PD officers (such as key member stakeholders); identification of opportunities for Coalition organizations to be responsive to their members and provide new member value through leveraging of the Coalition network, and sharing of resources; increasing alignment and cross-pollination at the needs identification stage; inviting participation by different types of organizations at different scales; establishing goals and pursuing Coalition activities beyond collaborative grant submittals; and facilitating the organizational change necessary to fully embrace cross-sector collaboration.

The recommendations below are specifically oriented toward immediate action by the Coalition and its member organizations.

Recommendations

Coalition members can directly, and quickly benefit from the trends noted among the 2016 interviewee organizations.

- Identifying trends and needs: The organizations interviewed utilized a wide variety of methods to identify CE/PD topics among their members and constituents. Advisory committee, steering committee, a formal Education and Training Committee, and Board member input were among the methods used. Other organizations fielded regular educational needs assessment surveys, or utilized the input of communities of interest or specialty groups among their members. Some addressed new topics in a webinar first and then developed longer, on-site classes later. **Gathering a compendium of “best practices” in CE/PD needs analysis would help organizations to improve their work in these areas.**
- As in the “Mapping the Landscapes” survey and focus group projects, there were several topics and areas of instruction which interviewees felt were open for further curriculum development. These included:
 - “Soft skills” such as management, human resources, copyright, and people skills.
 - Digital preservation and curation

- Diversity/Inclusion/Social Justice
- Marketing/Outreach/Advocacy
- Leadership Development
- Instructional Design
- Succession Planning

Simply by the nature of these topics, all of which but one are non-technical, there is an opportunity to develop cross-sector training which can be applicable to all types of cultural heritage institutions.

And, the digital topic can at least be addressed at a basic level by a course which could cross institution-type boundaries.

- There is a strong feeling among those interviewed that institutional support for CE/PD, including organizations paying for employee training and providing time for CE/PD participation, is very important. **This lines up with a key aspect of the Coalition’s National Agenda, and should be a key area of Coalition advocacy as the group continues to work in the future.**
- **Focusing conversations on continuing education/professional development program sustainability would be an excellent role for the Coalition.** While sustainability of education programs was a difficult discussion topic in each of the interviews, there are some evolving good practices including certificate programs, endowments, sponsorship, and regular needs assessment. **Developing presentation opportunities at Coalition in-person meetings or via webinars to review these sustainability tools is an important activity which the Coalition should do soon.**
- While all of the organizations interviewed do some type of evaluation of their CE/PD offerings, they feel a strong need for improvement in their evaluation practices. **A Coalition-wide focus on evaluation practices, including sharing tools, practices, and results, is an area which could give all organizations more confidence in their work.**
- Organizations that were interviewed all felt that they are only at the beginning of offering cross-sector training. They are “more mindful of cross-sector needs,” but have concerns about issues including marketing educational offerings across sectors. However, several organizations talked about topics that they feel would be excellent for cross-sector CE/PD offerings (mentioned in the list above). **Developing task forces or interest groups of Coalition member organizations to work on development of courses in these areas during 2017 could provide the organization with a number of offerings that have been identified as “hot topics” within the community by the Mapping the Landscapes needs assessments.** For example, many Coalition members are already doing this work through the Nexus LAB (Leading Across Boundaries) project, developing open leadership development curricular resources for instructors to pick up, customize, and brand for their individual organizations.

So, while there are certainly some competitive aspects of CE/PD development and production between Coalition members, this study found many opportunities for cross-organizational and cross-sector collaboration that can assist all cultural heritage associations and groups in offering consistently better training to their constituents.



Appendix A: Coalition Supply Project

Phone Interview Moderator's Discussion Guide

- Facilitator/Scribe Introductions, Project Purpose, Purpose of Interview Session, Process Agreement, Methodology, Participant Introduction
- 1. Please describe the activities of your organization and the role Continuing Education/Professional Development (CE/PD) plays – is it your main function, a department, or does it fulfill another role in the organization?
- 2. How does your organization identify training needs and decide what CE/PD content to produce?
 - a. How do you address early-, mid-, and late-career member and non-member learning needs?
 - b. What type of data-driven decision-making is used in your CE/PD Planning?
- 3. What surpluses and shortages do you see in the cultural heritage field as far as class topics/class offerings?
- 4. Talk about curriculum development methodologies -- how does your organization build its CE/PD offerings?
 - a. (Probe #1 suggestions: are they contributed by volunteers, developed in-kind by members, developed by in-house experts at your organization; developed by outside experts/consultants? Do you have a standard development process and timeline?)
 - b. (Probe #2 questions: What type of input do staff, committee members, and organizational members have on your CE/PD offerings? Does staff work in creator/producer roles? Does staff do quality control?)
- 5. How do you promote and create demand for your CE/PD offerings? (Probe suggestions: dedicated marketing staff, word of mouth, other strategies?)
- 6. How is your CE/PD distributed? (Probe question: what modes? In-person, webinar, recorded webinar? Which is the most popular mode?)
- 7. How is CE/PD development funded at your organization? (Probe suggestions: Grants, dues, paid for by member organizations, paid for by individual members?)
 - a. How are pricing decisions on your CE/PD offerings made? (Probe: relationship between development funding and pricing decisions?)
- 8. How is CE/PD participation funded by members of your organization? (Probe questions: How is CE/PD that your members take funded? Who pays for the CE/PD that is taken? Probe suggestions: Grants, dues, paid for by member organizations, paid for by individual members?)
- 9. How does your organization plan for sustainability of its CE/PD offerings?

10. From research or discussion with your members and CE/PD users, what factors lead them to select specific CE/PD opportunities? (Probe Suggestions: timing – in conjunction with regional and national workshops; cost; topic; format; trainer; organization offering the training; certifications; curriculum guidelines; competency requirements?)
11. Does CE/PD drive membership for your organization?
12. Talk about the evaluation methods and processes your organization uses for its CE/PD offerings.
13. Does your organization currently offer cross-cultural-sector training opportunities? (Probe questions: do your offerings attract cross-sector audiences? Do you specifically design for cross-sector audiences? Do you promote to cross-sector audiences?)
 - a. How would your organization go about offering further cross-sector training opportunities?
14. Would your organization be willing to share a document which lists all of the CE/PD topics on which your organization offers courses?
15. What else would you like to add about CE/PD issues?